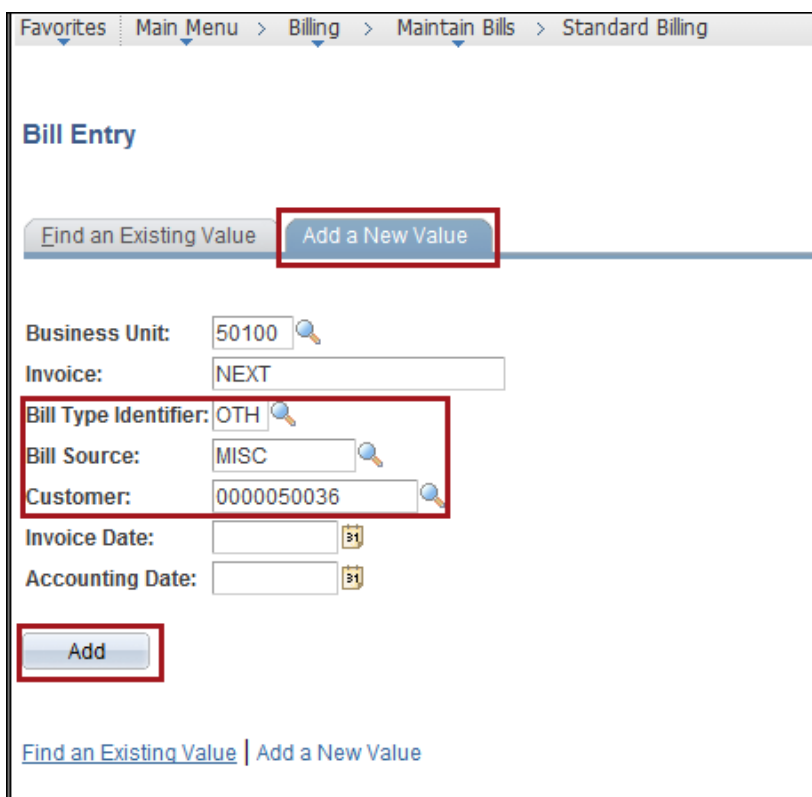**CARDINAL**™

About Recurring Bills

Recurring bills allow for the reproduction of bills, or portions of bills, and the generation of invoices by using templates. Associating a recurring bill template with a predefined schedule (using the Recurring Schedule fields) allows you to control when and how often recurring bills are generated. Schedules automate and control the generation of recurring bills. Bills are generated monthly in Cardinal.

To Create a Recurring Bill:

1 Navigate using the following path:

Billing > Maintain Bills > Standard Billing

2 Enter a new bill by selecting the **Add a New Value** tab.

3 Enter the required standard billing fields according to your agency's policy. At a minimum, enter the following information:

    a. **Bill Type Identifier**

    b. **Bill Source**

    c. **Customer**

4   The **Header – Info 1** tab displays. Select the following values:

      a. **Cycle ID: MTH-RECUR**

      b. **Frequency – Recurring**

5   Click the **Save** button.

6   Create the recurring bill schedule by selecting the **Go To Recurring Bill Schedule** icon 🔲 .

7   The **Recurring Bill Schedule** page displays. Use the **Recurring Bill Schedule** page to create a recurring bill schedule and to pre-assign invoice numbers.

8   At a minimum, enter or select values for the following fields:

  a. **Start Date**

  b. **End Date**

  c. **Generate Date**

  d. **Invoice Date**

  e. **Bill Header from Date**

  f. **To Date**

9   Click the **Pre-assign Invoice Numbers** box to create the invoice numbers for the bills.

10   Click the **Save** button to generate the recurring bill schedule.

11   Click the **Return to Bill Entry** link.

12 Click the **Line-Info 1** tab.

13 Enter the desired bill line information. At a minimum, enter values in the following fields:

    a. **Table**

    b. **Identifier**

    c. **Gross Extended**

14 Click the **Refresh** button.

15 Click the **Header – Info 1** page.

16 Change the **Status** field from **New** to **RDY**.

17 Click the **Save** button.

Note: A recurring bill process runs to create a bill from the recurring bill template. This process creates the bill when the system date is equal to or greater than the recurring bill generate date.